

**San Bernardino Associated Governments  
Request for Proposals No. 08-010 for  
IT Consultant Services  
for  
Project Management and Accounting Information System**

This Request for Proposal (RFP) describes San Bernardino Associated Governments (SANBAG) need for Information Technology (IT) consultant services. It is organized into the following sections:

- I. Introduction
- II. Purpose of the Request
- III. Evaluation Process
- IV. Selection Timetable
- V. Scope of Service
- VI. Format for Proposals
- VII. Award of the Contract

**I. Introduction**

**A. General Information**

San Bernardino Associated Governments is the council of governments and transportation planning agency governed by the mayors of twenty-four cities and the five San Bernardino County Supervisors. SANBAG serves the 1.9 million residents of San Bernardino County. Membership includes the County of San Bernardino and all cities within the County: Adelanto, Barstow, Big Bear Lake, Chino, Chino Hills, Colton, Fontana, Grand Terrace, Hesperia, Highland, Loma Linda, Montclair, Needles, Ontario, Rancho Cucamonga, Redlands, Rialto, San Bernardino, Twentynine Palms, Upland, Victorville, Yucaipa, and the Towns of Apple Valley and Yucca Valley.

Since its creation as a council of governments in 1973, SANBAG has been designated to serve as several additional authorities, created primarily by statute, which are all organized under the umbrella of the council of governments. These authorities are listed below:

- As the **County Transportation Commission**, SANBAG is responsible for short and long range transportation planning within San Bernardino County, including coordination and approval of all public mass transit service, approval of all capital projects for mass transit and highway projects, and determination of staging such projects in the Transportation Improvement Program. As the designated transportation planning agency for San Bernardino County, SANBAG administers

Local Transportation and State Transit Assistance Funds.

- As the **Service Authority for Freeway Emergencies**, SANBAG operates a system of approximately 1,600 call boxes on state freeways and highways within San Bernardino County.
- As the **County Transportation Authority**, SANBAG is responsible for the administration of the voter-approved half cent transportation transactions and use tax which will raise over \$1.8 billion through 2010 for funding of major freeway construction, commuter rail service, local street and road improvements, special transit service for the elderly and disabled population, and traffic management and environmental enhancement efforts.
- As the **Congestion Management Agency**, SANBAG monitors the performance level of the regional transportation system in a manner which ensures consideration of the impacts of new development on the system and promotes air quality through implementation of strategies in the adopted air quality plans.
- As a **Sub-regional Planning Agency**, SANBAG represents the San Bernardino County area with the Southern California Association of Governments in carrying out its functions as the metropolitan planning organization. SANBAG performs studies and develops consensus relative to input into regional growth forecasts, regional transportation plans, and mobile source components of the air quality plans.

## II. **Purpose of the Request**

### A. **General Statement**

San Bernardino Associated Governments (SANBAG) is requesting proposals from qualified firms of IT professionals to advise SANBAG on all phases of selection and implementation of a new project management and financial/accounting information system. SANBAG would like to select and implement a new system as soon as possible. The new Measure I sales tax extension commences on April 1, 2010. **It is highly desirable to implement a new system by July 1, 2009 or earlier.**

### B. **Term and Conditions**

Proposals are requested for an approximate three year period starting with the date of hire through 6 months after initial implementation. In addition, SANBAG shall have the option to extend the engagement for up to two (2) additional years, one year at a time. The option years shall be exercised by written amendments executed by the parties.

Responses to this RFP become the exclusive property of SANBAG. At such time as

firms are selected and their names made public, all proposals submitted shall be regarded as public records.

The Agency considers its relationship with the consultant hired for this contract to be a professional one. Although this is a formal selection process, the Agency reserves the right to decline acceptance of any and all proposals, to negotiate engagement conditions with the selected firm and to waive provisions of the RFP at its sole discretion.

C. Subcontracting

No Subcontracting will be allowed without prior written consent from SANBAG.

**III. Evaluation Process**

A. General Description

Firms are requested to respond to this solicitation in the manner more fully described in Section VI below. Authority and local Agency staff will review and evaluate the responses received against the evaluation criteria listed below.

The proposals will be reviewed and selected firms will be short listed, interviewed and the final recommendation will be presented to the Administrative Committee and approved by the Board of Directors.

B. Evaluation Criteria

1. Qualification and experience of the firm. This will be evaluated based on the breadth and depth of the firm's experience as a whole in the performance of comparable IT assignments.
2. Qualification and experience of the individuals assigned to perform the work. This will be based on the resumes of the individuals who will actually oversee and perform the work, especially those senior staff committed to participation in the work.
3. Organization of the work and management plan. This will be based on the proposed approach to organizing, managing, and implementing the necessary tasks and the ability of the firm to complete the assignment in a timely manner.
4. Demonstrated understanding of the Agency's needs and proposed method of approach. This will be based on the preliminary description of the proposed approach to providing the required scope of services. This will give credit to

firms who demonstrate insight, needed emphasis, priority, innovative thinking and ability to function as an integral member of SANBAG's management team.

5. References for comparable past work. This will be based on references from several clients where comparable work was performed.
6. Cost. Cost will be a significant factor when other evaluation criteria are relatively equal. Fees could be fixed based upon phases of the Work Plan or on an hourly basis.
7. Actual or Potential Conflict of Interest. This will be based on an assessment of the firm's client list and the extent to which the firm may represent related entities whose interest may conflict with SANBAG. Formal or informal relationships with specific vendors must also be disclosed.

#### **IV. Selection Timetable**

The following timetable will apply to this RFP.

<u>Item</u>	<u>Date(s)</u>
Release RFP	6/13/07
Proposals Due - 3:00 p.m.	7/9/07
Determination of Short List	7/10/07 – 7/13/07
Interviews	7/26/07 – 7/27/07
Recommendation to the Administrative Committee	8/8/07
Admin Committee recommendation to the Board of Directors	9/5/07

#### **V. Scope of Services**

A. Services to be provided by the Consultant include:

1. Review the existing RCMS system to understand the technical characteristics and functions of the system.
2. Interview staff to understand strengths and weaknesses of the existing system and to develop requirements and criteria for a new system.
3. Develop a final schedule for the RFP, evaluation, selection and implementation process for the new system.
4. Advise and assist SANBAG staff in developing an RFP and list of vendors for receipt of the new RFP.

5. Advise and assist SANBAG in the evaluation of vendor RFPs.
6. Be available to participate, if necessary, in software demonstrations.
7. Advise and assist SANBAG in the implementation of the new system.

## **VI. Format for Proposals**

### **A. General**

The cost of preparing, submitting and presenting a proposal is at the sole cost and expense of the offeror.

### **B. Instructions**

1. The offeror should prepare its proposal using the order and designations as presented in the Scope of Proposals below.
2. The offeror shall submit five (5) copies of its proposal to:  
Mr. Terrence J. McGuire  
Chief Financial Officer  
San Bernardino Associated Governments  
1170 W. 3<sup>rd</sup> Street, 2<sup>nd</sup> Floor  
San Bernardino, CA 92410
3. Proposals must be received at the above address no later than 3:00 p.m. on July 9 2007. Faxes, late submissions, or proposal modifications will not be accepted after the closing date.
4. Any inquiries concerning the RFP should be made to Terry J. McGuire, Chief Financial Officer, (909) 884-8276, ext.124.
5. No contacts of any kind shall be made with Board members, their staffs, or SANBAG staff other than as provided above. It is intended that the selection shall be made on merit alone within the process set forth. Violation of this condition shall be cause for immediate rejection of the proposal.

### **C. Scope of Proposal**

You must provide the following information and your proposal should be concise and responsive. It should be no longer than 30 pages in length.

1. Title Page

Show the Request for Proposal subject, the name of your firm, local address and telephone number, name of contact person and date of the proposal.

2. Table of Contents

Clearly identify the material by section and page number.

3. Letter of Transmittal - Limit to one or two pages

- a. Briefly state your firm's understanding of the work to be done, a comment on the firm's ability to make a commitment to perform the work in a timely manner and a statement as to why the firm believes to be best qualified to perform the engagement.
- b. Give the names of the persons who will be authorized to make representations for your firm, their titles, addresses and telephone numbers.

4. Profile of the Organization, Technical Qualifications and Approach

- a. Provide a description of firm or firms proposed to perform the services. State the size of the firm, the size of the firm's staff, and the location of the office from which the work on this engagement is to be performed.
- b. Indicate the number of personnel (by level) located within the proposing office that will perform the services.
- c. Provide a list of five most relevant and recent prior government consulting assignments, including telephone number and contact person's name. Describe the types of services performed for those clients.
- d. Describe your approach to the provision of services. This should include at least the following points:

5. Summary of Individual Staff Technical Qualifications

Identify the managers and staff who will participate in the provision of services, including staff other than from the proposing office. Include resumes for each person to be assigned. Identify the percentage of time key members will work on the contract. Be sure to include information on the

government project management and financial/accounting information system experience of each person, including any relevant continuing professional education and/or membership in professional organizations as they pertain to this contract.

6. Fee Proposal

The fee proposal shall contain cost information for each area of work as defined in Section V and shall include the method by which the fees will be increased (i.e. CPI) during the term of the engagement. Please provide hourly rates for each team member assigned to the project.

**VII. Award of Contract**

The Authority reserves the right to reject any and all proposals or to appoint one or more firms. Award of the contract will be made to the firm, in the sole opinion of the Authority, which will provide the best service and best meets the needs of the Authority.

The Authority is under no obligation to accept the lowest bidder. The Authority reserves the right to further negotiate services and costs which are proposed.

The terms and conditions of the work shall be set forth in a final Professional Services Contract to be negotiated. The engagement shall be for a term of approximately three years with two options for an additional year.